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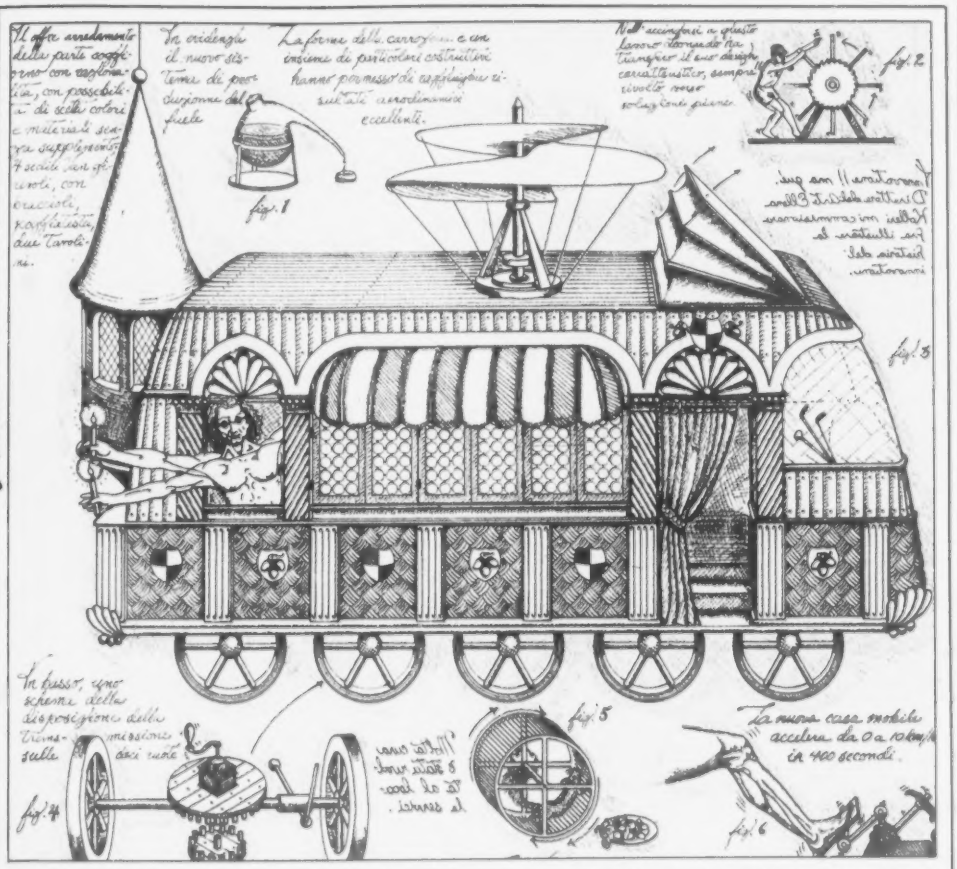
RV BUSINESS



INNOVATION: RV manufacturers and suppliers outline their strategies for staying on the leading edge of product development with changes that range from the cosmetic to the revolutionary. See page 26.

Early Shows Seem to Signal Sales Upswing

Reports from promoters and dealers participating in the early-season RV shows indicated that consumer interest is building and that the industry may be leaving behind the doldrums of 1989.

The good news came from both coasts of the country in January, where shows in Florida and Washington state drew unexpectedly strong crowds of consumers in a buying mood.

At the Tacoma RV Show, held Jan. 3-7 in that Washington city's Tacoma Dome, attendance nearly doubled from last year, topping out at just over 35,000, according to Bob O'Loughlin, show producer. O'Loughlin said that a major factor in the high attendance figures was the fact that, for the first time in several years, the show was not in competition with the Seattle Kingdome Show, which was rescheduled to accommodate the NFL playoffs.

Assessing the show from a dealer perspective, Stan Jones, vice president of Tacoma, Wash.-based Central Trailer Sales, said, "The show went very well for us. We were a bit disappointed because we did not make as many sales at the show as we wanted. But we are finding that we are getting a lot of spinoff from the show and have had unusually heavy traffic on our lot since the show ended."

Jones and other Tacoma Dome exhibitors noted that consumers who shopped the show favored Class As and appeared to show a preference for lower-priced units. "Consumers are very value-conscious right now. They are showing a definite preference for more up-to-date units that are featuring things such as the latest laminates and one-piece roofs," Jones observed.

On the other side of the country, at the Florida RV SuperShow, officials of the Florida RV Trade Association, the sponsor

continued on page 14

7 RVDA Studies RV Technician Certification

7 Coleman to Keep Air Conditioning, Awning Lines

8 Fla. SuperShow Reports Record Attendance

8 RVIA Plans New Cable-TV Show

9 ElDorado Files For Chapter 7 Liquidation

9 Bank Seizes Vyquest Assets, Seeks Buyer

9 Cree Coach Is Acquired

10 RVIA Advisory Panels Meet on Technical Institute

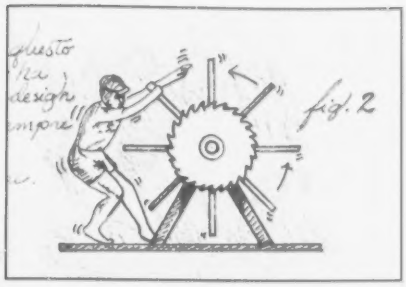
11 Fold-down Makers Foresee Improved 1990 Market

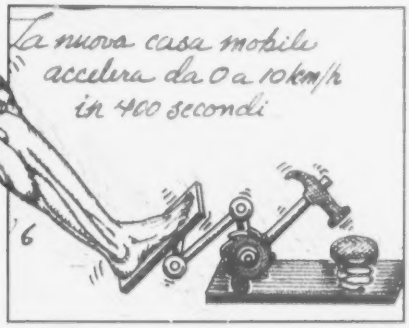
11 Fleetwood Letter Outlines Plans For Coleman Line

13 Washington, D.C., Show Reports Crowds, Sales

RV BUSINESS

VOLUME 40, NUMBER 23 | MARCH 9, 1990 | TWO DOLLARS





26

42

COVER ART: ROBERT LAMARCHE

NEWS AND TRENDS

Industry News ____ 7
RV People ____ 16
RVIA Shipments ____ 18
At Retail ____ 20
DAB Perspective ____ 22

FEATURES

Innovation
RV Makers ____ 26
RV Suppliers ____ 27

In two companion features, RV manufacturers and RV suppliers discuss how and why they gamble on development of new products and technologies. Company executives then outline their different strategies for minimizing the risks and maximizing the chances for consumer acceptance.

DEPARTMENTS

Service ____ 38
Dealer Concepts ____ 40
Calendar ____ 44
In Brief ____ 46
Profitmakers ____ 47
Index to Advertisers ____ 50
Readers' Forum ____ 52
Classified Advertising ____ 55
Commentary ____ 58

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'89 SHIPMENTS TOOK TIME OFF

MORTON J. MARCUS

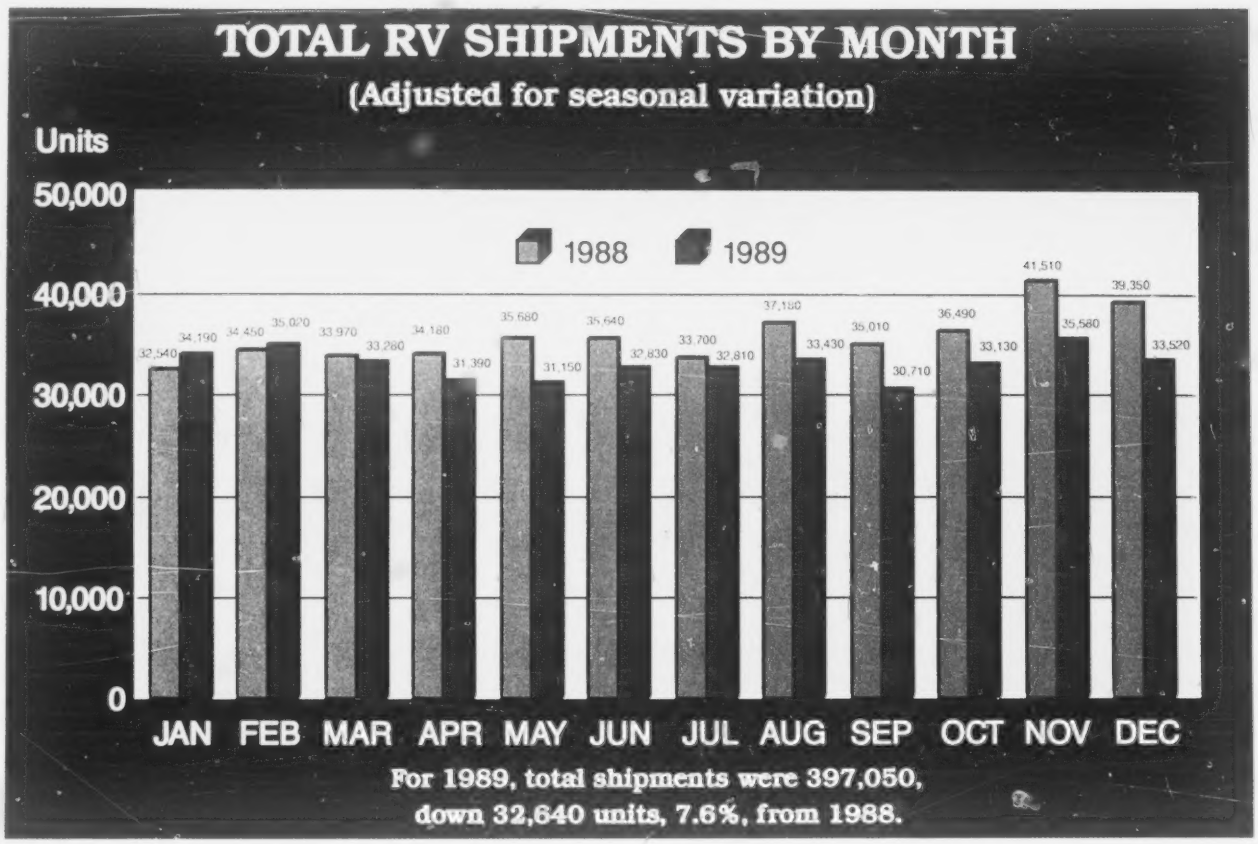


Figure 1

Some readers have suggested that this monthly column should be more upbeat when reporting less-than-ecstatic shipment news. "Don't tell us that shipments were down by 10%," we were advised. "Say that they were 90% of previous levels."

Perhaps economic writers should work part-time in candy factories so that they could learn how to sweeten reality. Many economists are accused of being dismal people; how about this for good-news writing: In 1989, the RV industry enjoyed an unanticipated four-week vacation.

The above statement is the upbeat way of saying that total shipments for the year were almost 33,000 units below 1988. To get that positive spin on the news, we took the rate of shipments in 1988 (about 8,260 units per week) and figured out how many weeks of "vacation time" would be represented by 33,000 fewer units in 1989. Didn't you feel that you had an extra, fun-filled month of vacation time in 1989?

December 1989 was the 10th consecutive month in which shipments were below the level of the corresponding month in 1988. December was the second consecutive month with shipments more than 14% below the tally of the same month in '88.

November 1989 had the honor of being furthest away from its counterpart of 1988, coming in 5,930 units behind November 1988. Last December's point of pride was that, at 14.8% off the 1988 pace, it had the greatest percentage difference from the previous year. *(See Figure 1.)*

The falloff in shipments of towables showed up right at the start in January 1989. At that point, shipments were down by only 3% from 1988, but things never got any better. In each month of 1989, towable shipments continued at a pace behind that of the same month in 1988. June was the low point for towables, with shipments down to 10,200 units, or 23% less than June '88.

1989 closed with December shipments of towables at 11,700, off 11% from December '88. For the year, towables were down by 15,700 units, or 10.5%, from 1988's total. That's equivalent to closing down for about five weeks at the shipment rate of '88.

Motorhomes, however, had a worse experience than towables. Although January 1989 seemed to be a sign of hope, with shipments

GRAPHICS: CUSTOM COLOR VISUALS

MARKET SHARE BY TYPE OF UNIT
(Year-to-date, adjusted for seasonal variation)

	1989	1988
TOTAL RVs	100.00	100.00
Travel Trailers:		
Conventional	13.49	13.55
Park Models	1.87	1.71
Fifth-wheels	7.43	7.27
Folding Camping Trailers	8.59	9.87
Truck Campers	2.50	2.56
TOTAL TOWABLES	33.88	34.97
Motorhomes:		
Class A	8.91	9.65
Class B Van Campers	1.25	1.21
Class C:		
Minis	4.24	5.11
Low Profiles	0.36	0.44
Micro-minis	0.59	0.55
TOTAL MOTORHOMES	15.35	16.97
Multiuse Van Conversions	50.76	48.07

Percentages may not add to total because of rounding.

Figure 2

up by 14% from the opening month of '88, motorhome shipments then quickly fell behind the 1988 pace. By May, shipments were off by 15% from the same month of '88. Motorhome shipments hit bottom in October '89, with shipments down by nearly 31% from a year earlier. December closed out a bad year with shipments down by 27% from 1988. For 1989 as a whole, motorhomes were off by almost 12,000 units, or 16%. This translates into a hiatus in motorhome shipments equal to more than eight weeks, based on the 1988 pace.

Van conversions did not completely escape the general slump in shipments, but they did fare better. Shipments in five of the first seven months of 1989 were up from 1988 levels. But, by November 1989, shipments were down nearly 18% from November 1988, and while December showed an improvement, it was still only 13% below conversions' year-earlier performance. For the full year, van conversions were down from 1988 by 5,000 units, or 2.4%.

December '89 Signals

A detailed look at last December's shipments offers an interesting picture. Although total shipments were lower than in November '89, all of the decline can be seen as a van conversion phenomenon. *(See Figure 3.)* The industry as a whole was down by 2,060 units (6.7%) from November, but December van conversions alone were off by 2,120 units (14%) from November. This means the rest of the industry was up slightly.

Actually, towables were unchanged in December 1989. The December decline of 10 units shown in *Figure 2* could easily be the result of rounding, and thus of no consequence. Similarly, the gain of 70 units by motorhomes is a statistical artifact rather than a number of real meaning.

Within each group, the up-and-down movements from November to December tended to offset each other. Folding camping trailers had a relatively good month (up by nearly 20%), and both truck campers and fifth-wheels showed some gains, too. The increases in these RV categories, however, were canceled out by declines in shipments of conventional travel trailers and park models.

As a group, towables gave evidence of a downward trend in the first six months of 1989, but, in the second half of 1989, the trend for towables has been upward since their June low point.

In like fashion, the December '89 gains of Class A and Class B motorhomes were almost completely offset by a decline in Class C units. For five consecutive months at the end of 1989, motorhomes moved in a tight 2% range between 4,480 and 4,590 units. Motorhomes in 1989 trended downward ever since the 5,830-unit monthly average of the first quarter.

The December '89 decline in van conversions may be of less importance than it would appear. November was an extraordinary month for shipments of van conversions in both 1988 and 1989. In '88, November recorded a huge 30% increase over October shipments. In '89, November again saw a major run-up in shipments over October. In both 1988 and 1989, December moved back toward the pattern of earlier months. What we may have here is a change in seasonal patterns.

Market Share Shifts

As December closed out the calendar year, it was clear that van conversions were the big *relative* gainers in terms of market share. *(See Figure 2.)* During seven months of 1989, conversions had over half the market. For the year as a whole, vans came in with 50.8% of the market. This was a gain of 2.7 market-share points from 48.1% in 1988.

The market gain made by van conversions was predominately at the expense of motorhomes. Sixty percent of van conversions' gain in market share came from motorhomes. Within the motorhome group, only Class B units showed a slight gain in market share. Both Class A's and Class C's lost some of their market share. Although motorhomes averaged a 15.4% market share in 1989, they held less than 13% of the market in December '89, culminating a downward trend that had been in effect for most of the year.

The relative decline of towables in 1989 was not spread evenly within that group. In this sector, the lost market share was due to a 1.3-point loss by folding camping trailers. The small market-share losses registered by convention travel trailers and truck campers were more than offset by the gains of park models and fifth-wheels.

1989 may not have been the way that the industry would have liked to end the decade, but it may have provided at least one useful lesson to the workaholic. There was no point in avoiding vacations and working harder in the sluggish 1989 market; the end result was the same as if we were all on vacation anyway! Δ

RV SHIPMENTS BY TYPE OF UNIT
(Adjusted for seasonal variation)

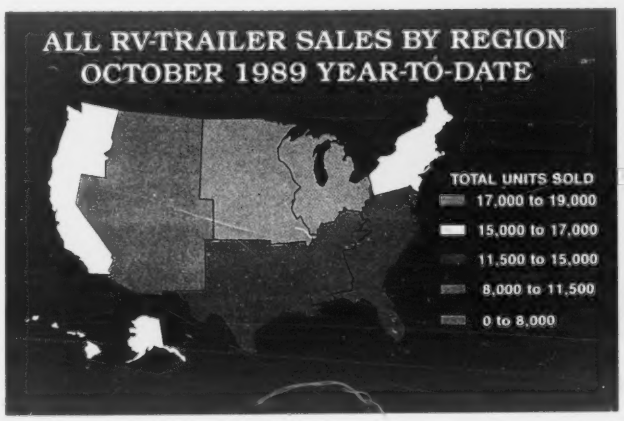
Type of Units	Dec 1989	Change From Nov 1989 Number	%	Year-to-Date 1989	1988	Change Number	%
TOTAL RVs	33,520	-2,060	-6.7	397,050	429,690	-32,640	-7.6
Travel Trailers:							
Conventional	4,240	-810	-13.7	53,530	58,240	-4,660	-8.0
Park Models	390	-160	-31.0	7,410	7,350	60	0.9
Fifth-wheels	2,880	120	5.1	29,510	31,260	-1,740	-5.6
Folding Camping Trailers	3,350	560	19.6	34,120	42,400	-8,280	-19.5
Truck Campers	920	70	8.2	9,930	10,900	-1,060	-9.8
TOTAL TOWABLES	11,680	-10	-0.1	134,520	150,250	-15,720	-10.5
Motorhomes:							
Class A	2,820	130	5.0	35,370	41,450	-6,070	-14.7
Class B Van Campers	420	80	18.4	4,970	5,210	-240	-4.6
Class C:							
Minis	1,070	-100	-8.5	16,850	21,960	-5,110	-23.3
Low Profiles	140	140	122.9	1,440	1,900	-460	-24.4
Micro-minis	100	100	90.6	2,330	2,260	50	2.2
TOTAL MOTORHOMES	4,550	70	1.4	60,970	72,910	-11,940	-16.4
Multiuse Van Conversions	17,250	-2,120	-9.9	203,560	206,540	-2,980	-1.4

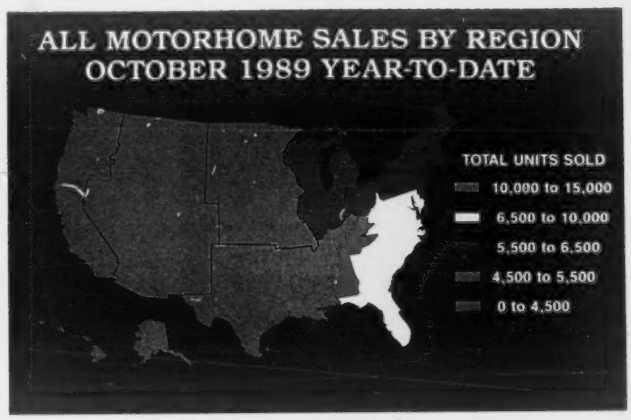
Note: Data rounded to nearest 10 units.

Figure 3

RV SALES DECLINE BEGAN TO SLOW IN OCTOBER '89

THOMAS WALWORTH





East North Central: Illinois, Indiana, Michigan, Ohio, Wisconsin; **Mountain**: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming; **Northeast**: Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont; **Pacific**: Alaska, California, Oregon, Washington, Hawaii; **South Atlantic**: Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia; **West North Central**: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota; **South Central**: Texas, Oklahoma, Arkansas, Louisiana, Tennessee, Mississippi, Alabama.

Retail sales figures for October 1989 show that, for the 1989 year-to-date, the motorhome market was down 6.32% compared with the same 10-month period of 1988. Similarly, the RV-trailer market was down 7.08% for the year-to-date.

However, in a month-to-month comparison, it is clear that the rate of sales decline was slowing for both the motorhome and RV-trailer markets. For example, the motorhome market for October 1989 had a 202-unit decline when a comparison is made with October '88, but this was about half of the decline in September '89 from September '88.

Figure 1 shows the regions of the country ranked according to the percentage change in October 1989 motorhome sales when compared with October '88. In the leading Pacific region, California had the largest percentage gain from its October '88 tally. In the lowest-ranked East North Central region, Ohio recorded the largest decline.

As noted earlier, the motorhome market on a year-to-date basis lagged 1988 by 3,296 units, or 6.32%, by October '89. Yet this deficit was an improvement over the September '89 year-to-date shortfall. In Figure 2, the seven national regions are ranked by their percentage changes for the '89 year-to-date when compared with the same 10-month period in 1988. The South Central region led the pack, with Texas registering the largest gain on a year-to-date basis in that region. The Mountain states came in last among the seven regions, and Arizona was the Mountain state experiencing the largest percentage decline.

As in the motorhome market, the retail figure for RV trailers in October 1989 was down from the sales level of October '88, for a total drop of 3.20%, or 240 units. But, again, this was an improvement over the market decline in September '89 compared with September '88. Figure 3 lists the na-

MOTORHOMES, OCT. '89

Oct. '89 Rank	Region	% of Change From Oct. '88	Sept. '89 Rank
1	Pacific	7.1	3
2	S. Atlantic	– 2.0	1
3	Mountain	– 9.3	5
4	Northeast	–12.7	4
5	W.N. Central	–12.7	6
6	S. Central	–13.0	2
7	E.N. Central	–15.7	7

Figure 1

MOTORHOMES, YEAR-TO-DATE

Oct. '89 Rank	Region	% of Change Year-to-Date	Sept. '89 Rank
1	S. Central	– 1.7	1
2	Pacific	– 4.2	2
3	W.N. Central	– 6.6	3
4	S. Atlantic	– 7.5	5
5	E.N. Central	– 7.9	4
6	Northeast	– 8.6	6
7	Mountain	–11.2	7

Figure 2

RV TRAILERS, OCT. '89

Oct. '89 Rank	Region	% of Change From Oct. '88	Sept. '89 Rank
1	W.N. Central	12.4	4
2	S. Central	7.3	2
3	E.N. Central	3.8	7
4	Northeast	– 3.8	5
5	S. Atlantic	– 7.4	1
6	Pacific	– 8.8	3
7	Mountain	–19.1	6

Figure 3

RV TRAILERS, YEAR-TO-DATE

Oct. '89 Rank	Region	% of Change Year-to-Date	Sept. '89 Rank
1	S. Central	0.2	1
2	Mountain	– 4.5	2
3	W.N. Central	– 4.8	4
4	S. Atlantic	– 6.1	3
5	Pacific	– 6.8	5
6	E.N. Central	– 9.4	6
7	Northeast	–13.1	7

Figure 4

GRAPHICS: CUSTOM COLOR VISUALS

tional regions according to the percentage change in RV-trailer sales from October '88. The West North Central region topped the rankings for the month, with Nebraska having the largest gain in the region. Meanwhile, the Mountain region trailed all others, and Utah reported the largest decline among the Mountain states.

Although regional markets that were strong in the beginning of the year were slowing down, other markets had come on strong to decrease the sales shortfall compared with 1988.

For the year-to-date in October 1989, the RV-trailer market was down by 7,730 units, or 7.08% as noted earlier. However, once more, this was an improvement over the year-to-date deficit recorded in September '89. Figure 4 ranks all regions by their October '89 year-to-date percent of change from the same period in 1988. The South Central region led the rankings, with Oklahoma having the largest year-to-date gain over 1988. The Northeast region lagged all others, and Massachusetts had the largest decline among the Northeastern states.

From these figures, it is clear that the rate of retail decline for both the RV-trailer and motorhome markets was slowing by October 1989. Although regional markets that were strong in the beginning of the year were slowing down, other markets had come on strong to decrease the sales shortfall compared with 1988. The East North Central and the South Central markets are excellent examples of these late-in-1989 regional changes.

As a result, the RV market as a whole should finish out 1989 very close to the retail sales total of 1988. The inventory rate adjustment, combined with the strong retail finish, should put the RV industry in good shape as it enters the 1990 market. Δ

Thomas Walworth is general manager of Statistical Surveys Inc., Grand Rapids, Mich., which has reported retail statistics for 30 years to the RV industry. Statistical Surveys is an acknowledged leader in the RV statistical field.

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DAB ENDS YEAR ON DISCOURAGING NOTE

GAYLORD MAXWELL

1989 ended on a somewhat discouraging note for most members of RVB's Dealer Advisory Board (DAB). December is always a somewhat discouraging month, and December '89 was even weaker than the same month in 1988.

The DAB members took in fewer dollars in December '89 than in December of the previous year; they sold fewer new units, and they sold fewer used. Two-thirds of them were down individually in sales volume. Four out of the five RV types were down in sales of new units (truck campers were up by two units), while three categories were down in used (both folding camping trailers and fifth-wheels made the plus columns by one unit each). In general, DAB members rated profits as low, particularly bottom lines.

More than half of the board members considered both their new and used inventories to be high. Lot traffic was considered poor, and new buyers were reported to be very scarce.

At the end of 1989, the board's aggregate sales volume exceeded that of 1988 by only a fraction of a percent. Considering inflation, dealers actually took in fewer dollars. Unit totals, both new and used, were down compared with the previous year. In nearly all respects, RV dealers fared less well in 1989 than they did in 1988.

Motorhomes

Most motorhome dealers' unit volumes were off by a unit or two last December. Only one had a significant increase – from two units sold in December '88 to six in December '89. Somewhat surprisingly, most deals produced decent grosses for the month, since the majority of the dealers reported profits as good for this RV type. As in the previous year, used units outsold new ones.

Although 1989 ended up behind 1988 in total motorhome-sales numbers, the 3% drop was far from disastrous. In general, it wasn't a bad year, particularly for some large motorhome specialists. Some dealers may have been down by a few units, but their numbers were still impressive.

Travel Trailers

In terms of percentages, the travel-trailer market sagged enormously last December. However, the unit numbers were not large, which distorted the percentage measure.

Only one dealer of this type managed to surpass December 1988's total. Five advisory-board dealers did not sell a single unit! Used units moved about as poorly as new units. Profit ratings were primarily in the poor column.

The 6% new-unit drop in 1989 from 1988 was not huge, but it clearly indicated that this particular segment of the market has problems. Since this RV type is most often the entry-level category, perhaps the lower interest rates predicted for 1990 will bring in buyers who are looking for lower payments.

Truck Campers

For the first time in many months, sales of new units for the last month of 1989 surpassed the number of new units sold in the same month of '88. The increase by two units did not signify a market surge, but, as the only plus of all types, it was a shining light last December. Used units moved very slowly, but they also managed to show a percentage increase. Profits were rated excellent by the advisory board's top truck-camper dealer.

For 1989 as a whole, truck-camper sales showed a significant drop in both new and used units. It should be noted that some of the apparent decline was due to the fact that dealers on the board sometimes try to sell this type of unit one year and then drop it the next, somewhat distorting our sales figures.

Folding Camping Trailers

Our camping-trailer sales figures for December '89 were quite small, which made percentage changes rather meaningless. However, our totals for the year of 1989 as a whole showed that some of our DAB members who sell camping trailers didn't do too badly.

The 1989 new-unit total was up by one unit from '88, while the used total dropped by only 5%. It should be noted that, to some extent, comparisons between 1988 and 1989 are distorted by the fact that one of our DAB members made a large discount purchase of units, which he passed on to the public. In general, however, most dealers didn't do quite as well in 1989 as they did in the previous year.

continued

	NEW UNITS						USED UNITS					
	FOR MONTH			YEAR-TO-DATE			FOR MONTH			YEAR-TO-DATE		
	DEC. 1989	DEC. 1988	% CHANGE	1989	1988	% CHANGE	DEC. 1989	DEC. 1988	% CHANGE	1989	1988	% CHANGE
MOTORHOMES	62	64	−12	1,617	1,665	−3	64	78	−18	1,487	1,536	−3
TRAVEL TRAILERS	29	44	−34	1,084	1,156	−6	31	40	−23	1,113	1,157	−4
TRUCK CAMPERS	21	19	+11	250	305	−18	4	3	+33	116	169	−31
CAMPING TRAILERS	2	3	−33	953	952	<+1	1	6	−83	330	348	−5
FIFTH-WHEELS	16	20	−20	423	385	+10	13	12	+8	174	177	−2

	FOR MONTH			YEAR-TO-DATE		
	DEC. 1989	DEC. 1988	% CHANGE	1989	1988	% CHANGE
SALES VOLUME	$6,427,610	$7,238,363	−11	$150,019,881	$149,970,338	<+1
TOTAL UNIT SALES	243	298	−18	7,058	7,361	−4
NEW-UNIT SALES	130	159	−18	4,058	4,201	−3
USED-UNIT SALES	113	139	−20	2,999	3,160	−5

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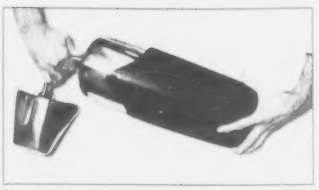

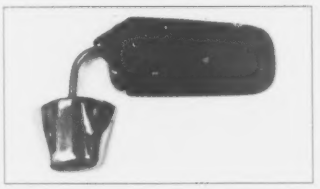

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DAB PERSPECTIVE *continued*

Fifth-wheels

The 20% drop last December was the greatest monthly decline for this type for all of 1989. However, for 1989 as a whole, fivers were the most successful of all the RV types. Their 10% sales increase over 1988 was clearly an indication that the fiver market was in reasonably good shape. Meanwhile, used sales were barely in the plus column for the month, and they were down for the year. Profit ratings were on the low side in December '89. Δ

The "DAB Perspective" is a compilation of data provided by *RV Business'* Dealer Advisory Board, a group comprised of 22 dealers representing a cross section of the U.S. dealer body.

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This report is an attempt to reflect the current retail sales picture; it does not purport to indicate RV production or factory sales to dealers.

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